

Message Text

PAGE 01 OTTAWA 02859 01 OF 02 302245Z

63

ACTION EUR-25

INFO OCT-01 ISO-00 CIAE-00 DODE-00 PM-07 H-03 INR-10 L-03

NSAE-00 NSC-10 PA-04 RSC-01 PRS-01 SPC-03 SS-20

USIA-15 ACDA-19 IO-14 SCEM-02 SCI-06 INT-08 EB-11

COME-00 OMB-01 TRSE-00 AGR-20 EA-11 SIL-01 LAB-06

NEA-10 ARA-16 AF-10 STR-08 FMC-04 CIEP-02 DRC-01 /253 W

----- 129876

R 302134Z NOV 73

FM AMEMBASSY OTTAWA

TO SECSTATE WASHDC 2209

UNCLAS SECTION 01 OF 02 OTTAWA 2859

PASS AGRICULTURE D.L. HUME, FAS

POUCHED ALL CONGENS IN CANADA

E.O. 11652: N/A

TAGS: EAGR CA ENRG

SUBJECT: IMPACT CANADIAN ENERGY SITUATION ON AGRICULTURAL
COMMODITY

REF: A. FASTO CIRCULAR 296 B. OTTAWA 2796 C. OTTAWA 2813
D. CN3107, NOV. 26

BEGIN SUMMARY AT PRESENT MOST GOC OFFICIALS AND TRADE
ANALYSTS FORESEE RATHER MODEST IMPACT OF PROSPECTIVE
CANADIAN ENERGY SHORTAGE ON ECONOMY GENERALLY AND ON
AGRICULTURAL SECTOR PROVIDED NO FURTHER SERIOUS
DETERIORATION IN INTERNATIONAL SITUATION AND U.S. ECONOMY
IN 1974. DEPMINAGR SEES POSSIBLE HIGH PRICE OF ENERGY
IN CANADA MORE SERIOUS THREAT TO FARMERS 1974 PRO-
DUCTION INTENTIONS THAN LIMITED ENERGY SUPPLIES.
AGRICULTURE DISSEMINATING VOLUNTARY SELF-HELP
ADVICE TO FARMERS. PRIME MINISTER AND ENERGY MINISTER
UNCLASSIFIED

PAGE 02 OTTAWA 02859 01 OF 02 302245Z

HAVE ADDRESSED NATION ON GENERAL ENERGY SITUATION
IN CANADA AND VOLUNTARY CONSERVATION MEASURES.
REVIEWING IMPACT ON SPECIFIC AGRICULTURAL
COMMODITIES, AGATT OFFICE CONSIDERS POTENTIAL SHORTAGES

AND HIGHER ENERGY PRICES IN 1974 WILL HAVE A MODERATE MINUS EFFECT ON AVAILABILITIES, SHIPPING, AND TRADE AS INDICATED. AS REQUESTED, UPDATING REPORTS TO FOLLOW BIWEEKLY. END SUMMARY

1. IMPACT ON GENERAL ECONOMY

AT PRESENT MOST KEY GOC OFFICIALS AND BUSINESSMEN CONCERNED WITH ENERGY SITUATION IN PUBLIC STATEMENTS ARE INDICATING ONLY MODERATE EFFECTS EXPECTED ON CANADA'S ECONOMY IN 1974. AS RECENT AS NOVEMBER 28, A.J.D. SMITH, PRESIDENT, CONFERENCE BOARD OF CANADA, SAID ENERGY CRISIS WILL NOT AFFECT CANADIAN ECONOMY AS MUCH AS THAT OF U.S., JAPAN, AND COMMON MARKET. VARIOUS BOARD MEMBERS, USING BACKGROUND DATA DEVELOPED DURING OCTOBER 16 MEETING FORESEE CANADA'S GROWTH RATE IN REAL GNP DROPPING FROM 7 PERCENT IN 1973 TO AROUND 4.25 PERCENT IN 1974, A CONSUMER PRICE INDEX RISE OF BETWEEN 5.5 AND 6.5 PERCENT IN 1974 COMPARED TO 7.5 PERCENT RISE IN 1973, AND 1974 UNEMPLOYMENT RATE OF AROUND 5.25 PERCENT COMPARED TO 5.4 TO 5.5 FOR 1973.

2. CANADA'S OIL SUPPLY SITUATION CONTAINS SEVERAL ELEMENTS OF UNCERTAINTY AT PRESENT SUCH AS: ARAB OIL PRODUCTION CUTBACKS, UNCERTAIN CONTINUITY OF SUPPLY OF VENEZUELAN OIL TO EASTERN CANADA, POLITICAL AND PHYSICAL PROBLEMS OF MOVING WESTERN OIL TO EASTERN CANADA, IN PARTICULAR EXTENDING WESTERN CANADA-SARNIA PIPELINE TO MONTREAL. THESE FACTORS, AS YET NOT VERY QUANTIFIABLE, REPRESENT POTENTIAL MINUS FACTOR INDICATING HIGHER PRICES AND DECREASED OIL SUPPLIES IN EAST. AT PRESENT, PUBLIC STATEMENTS BY GOC OFFICIALS ARE OPTIMISTIC WHEN EVALUATING IMPACT OF THIS ON CANADA'S ECONOMY AND TRADE IN 1974. FOR EXAMPLE, NOVEMBER 26, MINISTER OF ENERGY WHEN ASKED IN PARLIAMENT WHETHER HIS DEPARTMENT HAD MADE STUDY OF IMPACT OF ENERGY SHORTAGE ON CANADA'S ECONOMY OR ON CANADA-U.S. TRADE (QUESTIONER CITED UNCLASSIFIED

PAGE 03 OTTAWA 02859 01 OF 02 302245Z

PREDUCTIONS OF ZERO GROWTH, 6 PERCENT REDUCTION IN INDUSTRIAL PRODUCTION, 6 PERCENT UNEMPLOYMENT IN U.S.). MINISTER REPLIED QUOTE I DO NOT THINK I AM A SEER IN THE SENSE HONORABLE MEMBER MAY WISH ME TO BE BUT PRESENT INDICATIONS ARE THAT WE OUGHT TO HAVE VERY GOOD YEAR NEXT YEAR. END QUOTE

3. IMPACT ON AGRICULTURE

WHILE 1974 ENERGY SUPPLIES IN CANADA APPEAR GENERALLY ADEQUATE, AGATT OFFICE BELIEVES WORLD SHORTAGES WILL AFFECT CANADA'S AGRICULTURAL PRODUCTION AND TRADE. INCREASED COSTS OF ENERGY INPUTS INTO AGRICULTURE WILL LIKELY BE REFLECTED

IN HIGHER PRICES FOR CANADA'S AGRICULTURAL PRODUCTS IN 1974 IF FARMERS ARE TO CONTINUE EXPANDING PRODUCTION. DOMESTIC TRANSPORTATION AND EXTERNAL TRADE WILL BE AFFECTED BY OIL COST AND AVAILABILITY OF RAIL CARS. FOR EXAMPLE, LOCAL PRESS STATES VANCOUVER SHIPPING DEPENDS ON BUNDER OIL SUPPLIED PRIMARILY FROM U.S. A NOV. 29 NEWS RELEASE INDICATED PRICES OF BUNKER OIL ARE INCREASING RAPIDLY AND SUPPLIES ARE TIGHT IN CANADA. BUNDER OIL SALES TO OCEAN VESSELS CALLING AT CANADIAN PORTS ARE CURRENTLY RESTRICTED TO AMOUNT NECESSARY TO REACH NEXT PORT OF CALL PLUS 10 PERCENT.

4. GOVERNMENT ACTIVITIES

GOC ACTIVITIES BEING CLOSELY FOLLOWED AND REPORTED BY EMBASSY (THREE TO FIVE TELEGRAMS PER DAY RECENTLY) TO EB/FSE/STATE/ W. SUGGEST FAS ENERGY ACTION OFFICERS ASSURE THEY ON DISTRIBUTION. NOTEWORTHY RECENT REPORTS ARE PRIME MINISTER'S NOVEMBER 22 ADDRESS TO NATION (REFTEL B) AND ENERGY MINISTER'S STATEMENT NOVEMBER 26 (REFTEL C). AGRICULTURE NOVEMBER 26 ISSUED "SAVE ENERGY-SAVE DOLLARS" SUGGESTIONS TO FARMERS (REF D). THIS PREPARED BY COMMITTEE IN AGRICULTURE HEADED BY ASSTDEPMIN J.C. WOODWARD WHICH ALSO RESPONSIBLE FOR PLANS FOR ENERGY ALLOCATION TO FARMERS IF NECESSARY. AT PRESENT, DEPMINAGR SAYS THERE NO GOC INTER-AGENCY COMMITTEE ON ENERGY CRISIS BUT HE ANTICIPATES ONE SHORTLY IN WHICH AGRICULTURE WILL BE REPRESENTED.

UNCLASSIFIED

PAGE 04 OTTAWA 02859 01 OF 02 302245Z

5. IN NOVEMBER 28 DISCUSSION WITH AGATT, DEPMINAGR S.B. WILLIAMS SAID HE FORESEES HIGH ENERGY PRICES AS MORE SERIOUS THREAT THAN SUPPLY SHORTAGES AFFECTING FARMERS PRODUCTION INTENTIONS IN 1974. CANADA'S GRAIN PRODUCTION WITH ITS HIGH ENERGY REQUIREMENTS IS LOCATED IN WEST WHERE MOST OIL PRODUCED, BUT COMPETITION EXPECTED TO BID UP PRICE FOLLOWING LIFTING OF DOMESTIC PRICE FREEZE FEBRUARY 1, 1974. WHILE EASTERN CANADA'S TYPE OF AGRICULTURE REQUIRES LESS OIL ENERGY INPUT, NEVERTHELESS SOME TRADITIONAL FOREIGN SUPPLIES ARE NOW JEOPARDIZED AS MENTIONED PREVIOUSLY. DEPMIN WILLIAMS AGREED THAT PRESENT OUTLOOK FOR ENERGY SUPPLIES FOR AGRICULTURE IN CANADA SUFFICIENT FOR 1974 SO THAT ONLY A MODERATE DEPRESSING EFFECT EXPECTED ON PRODUCTION AND TRADE, BUT HE STRESSED THIS WILL ALL DEPEND UPON PRICE OF THAT ENERGY TO FARMERS.

6. IMPACT ON AGRICULTURAL COMMODITIES

COTTON: CANADA'S TOTAL RAW COTTON IMPORTS REACHED ABOUT 340,000 BALES IN 1972-73 AND WE FORESEE ABOUT 350,000 FOR 1973-74. U.S. SHARE OF ABOVE WAS AROUND 278,000 BALES IN 1972-73 AND MAY REQCH ESTIMATED 290-300,000 IN

1973-74. IMPACT OF ENERGY SITUATION ON FUTURE IMPORTS
DISCUSSED NOVEMBER 27 WITH HEADS OF CANADA'S MAJOR TEXTILE
INDUSTRIES. RESPONDING TO REFTEL A, PARA. 3(A) QUESTIONS
OFFICIALS SAID CUTBACKS NOW TAKING PLACE IN PRODUCTION OF ALL
DOMESTIC SYNTHETIC FIBERS BUT COULDN'T QUANTIFY. ONE
REPORTED DUPONT ORDERED 15 PERCENT REDUCTION IN NYLON STAPLE
NOVEMBER 28. ANOTHER OFFICIAL STATED WHILE INDUSTRY
CUTTING BACK ON FIBERS MADE FROM PETROLEUM NEVERTHELESS
CANADA HAS ABUNDANT SUPPLY OF WOOD PULP FOR SWITCH TO PRO-
DUCTION OF LESS DESIRABLE CELLULOSICS IF RAW COTTON PRICES
TOO HIGH. RESPONDING TO QUESTION RE POSSIBLE
INCREASED DEMAND FOR RAW COTTON, ALL SAID THIS WILL

UNCLASSIFIED

PAGE 01 OTTAWA 02859 02 OF 02 302307Z

63

ACTION EUR-25

INFO OCT-01 ISO-00 CIAE-00 DODE-00 PM-07 H-03 INR-10 L-03

NSAE-00 NSC-10 PA-04 RSC-01 PRS-01 SPC-03 SS-20

USIA-15 ACDA-19 IO-14 SCEM-02 SCI-06 INT-08 EB-11

COME-00 OMB-01 TRSE-00 AGR-20 EA-11 SIL-01 LAB-06

NEA-10 ARA-16 AF-10 STR-08 FMC-04 CIEP-02 DRC-01 /253 W

----- 130011

R 302134Z NOV 73

FM AMEMBASSY OTTAWA

TO SECSTATE WASHDC 2210

UNCLAS SECTION 02 OF 02 OTTAWA 2859

DEPEND ON PRICE OF RAW COTTON. CANADIAN TEXTILES INSTITUTE
OFFICIAL SAID HE THOUGHT THERE WOULD BE NO SHORTAGE
PETROCHEMICALS IN CANADA FOR TEXTILE INDUSTRY. HE
MENTIONED CANADA DOES NOT PRODUCE POLYPROPYLENES
AND IMPORTS FROM U.S. DROPPED BY TWO-THIRDS IN PAST
TWO WEEKS. OFFICIALS FELT COTTON NOT READILY SUBSTITUTABLE
FOR MOST END USERS AND IT WOULD BE PROBLEM OF RE-DEVELOPING
CONSUMER TASTES AND PERHAPS USING COTTON AGAIN AS FILLER
FOR POLYESTERS. REGARDING POSSIBLE 1974 REDUCTION IN TEXTILE
OUTPUT AND LESS NEED FOR COTTON AND MAN-MADE FIBERS,
OFFICIALS SAID GOC TEXTILE POLICY (SEE CN3073,
SECTION G) SHOULD ASSURE NO MAJOR REDUCTION IN TEXTILE
OPERATIONS. THE INDUSTRY WOULD PREFER GOC CONTINUE THE
PRESENT VOLUNTARY PROGRAM FOR CONSERVING ENERGY BUT
EXPRESSED SOME CONCERN THAT RATIONING MAY BE IN OFFING.
IN ANY CASE, OFFICIALS FELT GOC COULD NOT AFFORD TO
REDUCE CANADA'S TEXTILE OPERATIONS DRASTICALLY BECAUSE

OF POSSIBLE UNEMPLOYMENT AND RELATED ECONOMIC REPERCUSSIONS
IN GENERALLY DEPRESSED AREAS OF EASTERN CANADA WHERE
MOST MILLS LOCATED.

7. GRAIN AND FEED
UNCLASSIFIED

PAGE 02 OTTAWA 02859 02 OF 02 302307Z

THE CURRENT ENERGY SITUATION IS NOT EXPECTED TO HAVE VERY
MUCH IMPACT ON CANADIAN PRODUCTION OF GRAIN AND FEED
COMMODITIES. PRODUCTION OF THESE COMMODITIES IS HEAVILY
CONCENTRATED IN THE PRAIRIE PROVINCES THAT HAVE SURPLUS
PRODUCTION OF ENERGY AND EXPORT LARGE QUANTITIES OF OIL TO
THE UNITED STATES.

THE ONLY FEED GRAIN IMPORTS MADE BY CANADA RE CORDN, PRI-
MARILY FROM THE UNITED STATES. AGATT OFFICE ESTIMATES CORN
IMPORTS IN 1973-74 AT 65 MILLION BUSHEL (CN3103) ALMOST
DOUBLE THE PREVIOUS YEAR'S LEVEL.

CANADIAN EXPORTS OF WHEAT, BARLEY AND OATS ARE EXPECTED
TO BE DOWN IN 1973-74 AS A RESULT OF REDUCED SUPPLY.
THERE ARE CURRENTLY MANY STORIES OF A SHORTAGE OF RAIL
CARS TO MOVE THE GRAIN TO EXPORT POSITION. HOWEVER, THIS
SITUATION IS NOT EXPECTED TO AFFECT THE EXPORT ESTIMATES
FOR THE ENTIRE 1973-74 YEAR.

ACREAGE IN 1974 IS NOT EXPECTED TO BE REATLY AFFECTED
BY AN ENERGY SHORTAGE EXCEPT POSSIBLY NITROGEN FERTILI-
ZERS. IF CANADA'S EVER INCREASING DEMANDS FOR FERTILI-
ZERS CAN NOT BE MET, THE IMPACT COULD BE FELT IN YIELDS
AT LOWER THAN MAXIMUM LEVELS. OBVIOUSLY, OTHER FACTORS
HAVE IMPORTANT IMPACT ON YELDS, I.E., MOISTURE, SUN-
LIGHT, CULTURAL PRACTICES, ETC. AGRICULTURAL INPUT
COSTS WILL INCREASE, BUT HIGH GRAIN PRICES ARE EXPECTED
TO RESULT IN AN EXPANDED ACREAGE IN 1974.

8. FATS AND OILS

MAJOR FATS AND OILS COMMODITIES PRODUCED IN CANADA RE
RAPESEED AND FLAXSEED. PRODUCTION IS CONCENTRATED IN THE
PRAIRIE PROVINCES WHICH HAVE A SURPLUS PRODUCTION OF
OIL/NATURAL GAS ENERGY. SOYBEANS ARE PRODUCED IN SOUTH-
WESTERN ONTARIO WHICH RECEIVES ITS OIL/NATURAL GAS ENERGY
SUPPLIES FROM SURPLUS PRODUCTION IN ALBERTA.

CANADA ONLY PRODUCES HALF OF ITS SOYBEAN REQUIREMENTS,
WITH IMPORTS FROM THE UNITED STATES AT ABOUT 10 TO 15
MILLION BUSHEL PER YEAR. POST HAS NO REASON, AT THE
PRESENT TIME, TO CHANGE OUR IMPORT ESTIMATES OUTLINED IN
CN3088.

UNCLASSIFIED

PAGE 03 OTTAWA 02859 02 OF 02 302307Z

CANADIAN EXPORTS IN 1973-74 ARE EXPECTED TO DECLINE AS A

RESULT OF REDUCED SUPPLIES.

SOYBEAN CRUSHING FACILITIES ARE NOT EXPECTED TO BE GREATLY AFFECTED BY THE ENERGY SITUATION SINCE THEY ARE LOCATED WEST OF THE OTTAWA VALLEY AND SUPPLIED WITH ENERGY FROM ALBERTA.

FLAXSEED ACREAGE IN 1974 EXPECTED TO EXPAND AGAIN DUE TO RELATIVELY HIGH PRICES CURRENTLY BEING RECEIVED BY PRODUCERS. ACREAGE IN RAPESEED AND SOYBEANS MAY NOT EXPAND IN 1974 SINCE PRICES FOR ALTERNATIVE CROPS HAVE BEEN VERY ATTRACTIVE THIS YEAR.

9. DAIRY

DAIRY PRODUCTION IS NOT EXPECTED TO BE AFFECTED BY THE ENERGY SITUATION. THE MAJOR ENERGY INPUT IN THE DAIRY INDUSTRY IS ELECTRICITY. CANADA HAS CONSIDERABLE HYDRO ELECTRICAL POWER, BUT OIL ENERGY SHORTAGES COULD AFFECT OUTPUT IN SOME EASTERN PROVINCES.

10. LIVESTOCK

1974 CANADIAN BEEF AND PORK PRODUCTION FORECAST AT 3.32 BILLION POUNDS, SLIGHTLY HIGHER THAN 1973 TOTAL ESTIMATED AT 3.25 BILLION POUNDS. HIGHER ENERGY PRICES WILL RAISE LIVESTOCK PRODUCTION COSTS BUT EASTERN CANADA, WHERE SHORTAGES WILL BE MOST SEVERE, DOES NOT PRODUCE THE MAJOR PORTION OF CANADA'S LIVESTOCK. GOC OFFICIALS INDICATE EASTERN CANADA AGRICULTURE LIKELY TO RECEIVE HIGH PRIORITY SHOULD RATIONING BE NECESSARY.

CANADA'S 1974 EXPORTS OF BEEF AND VEAL FORECAST AT 80 MILLION POUNDS, PORK AT 125 MILLION POUNDS. SHOULD FUEL LIMIT PACIFIC OCEAN TRAFFIC, BEEF IMPORTS FROM AUSTRALIA AND PORK EXPORTS TO JAPAN WOULD BE REDUCED. BEEF EXPORTS COULD ALSO BE REDUCED BECAUSE OF INCREASED DOMESTIC DEMAND.

11. POULTRY

CANADA LARGELY SELF-SUFFICIENT POULTRY AND EGG PRODUCTION. TRADE REPRESENTS SMALL PORTION TOTAL PRODUCTION. PRODUCTION UNCLASSIFIED

PAGE 04 OTTAWA 02859 02 OF 02 302307Z

PRODUCTION WELL DISTRIBUTED REGIONALLY. THE MAJOR ENERGY REQUIREMENT -- TRANSPORT OF FEED. ENERGY SHORTAGES NOT EXPECTED TO SERIOUSLY AFFECT 1974 POULTRY PRODUCTION FORECAST AT 1.05 BILLION POUNDS POULTRY MEAT, 475 MILLION DOZEN EGGS.

12. FRUITS AND VEGETABLES

1973 CROP HARVESTED WITHOUT ENERGY-RELATED PROBLEMS. ADEQUATE ELECTRICAL ENERGY AVAILABLE FOR OPERATION OF COLD STORAGE PLANTS. MOST ANALYSTS BELIEVE IT TOO EARLY TO ASSESS IMPACT ON 1974 CROP.

MOST IMMEDIATE SHORTAGE IS IN ONTARIO GREENHOUSE INDUSTRY. GREENHOUSE OPERATORS NOW SETTING TOMATO AND CUCUMBER SEED-LINGS FOR PRODUCTION EARLY 1974. OPERATORS RECENTLY MET WITH ENERGY/MIN. MACDONALD AND AGR./MIN WHELAN STATING THAT UNABLE TO GET PRICE OR SUPPLY COMMITMENTS ON NECESSARY NATURAL GAS AND OIL. ONTARIO PRODUCTION GREENHOUSE TOMATOES TOTALS 25 MILLION POUNDS AND GREENHOUSE CUCUMBERS 1.5 MILLIONDOZEN. THESE SOLD MAINLY TORONTO, MONTREAL MARKETS.

13. TOBACCO

NO PROBLEMS EXPERIENCED PRODUCING 1973 CROP OF 267 MILLION POUNDS. FUEL SUPPLIES ADEQUATE FOR HARVESTING AND CURING 1973 CROP. PRODUCERS FACE HIGHER 1974 FERTILIZER AND FUEL COSTS. THIS WILL REDUCE PRODUCTION UNLESS ADEQUATE PRICE GUARANTEES OBTAINED.
SCHMIDT

UNCLASSIFIED

<< END OF DOCUMENT >>

Message Attributes

Automatic Decaptioning: X
Capture Date: 11 MAY 1999
Channel Indicators: n/a
Current Classification: UNCLASSIFIED
Concepts: n/a
Control Number: n/a
Copy: SINGLE
Draft Date: 30 NOV 1973
Decaption Date: 01 JAN 1960
Decaption Note:
Disposition Action: n/a
Disposition Approved on Date:
Disposition Authority: n/a
Disposition Case Number: n/a
Disposition Comment:
Disposition Date: 01 JAN 1960
Disposition Event:
Disposition History: n/a
Disposition Reason:
Disposition Remarks:
Document Number: 1973OTTAWA02859
Document Source: ADS
Document Unique ID: 00
Drafter: n/a
Enclosure: n/a
Executive Order: N/A
Errors: n/a
Film Number: n/a
From: OTTAWA
Handling Restrictions: n/a
Image Path:
ISecure: 1
Legacy Key: link1973/newtext/t19731166/abqceghw.tel
Line Count: 345
Locator: TEXT ON-LINE
Office: ACTION EUR
Original Classification: UNCLASSIFIED
Original Handling Restrictions: n/a
Original Previous Classification: n/a
Original Previous Handling Restrictions: n/a
Page Count: 7
Previous Channel Indicators:
Previous Classification: n/a
Previous Handling Restrictions: n/a
Reference: A. FASTO CIRCULAR 296 B. OTTAWA 2796 C. OTTAWA 2813 D. CN3107, NOV. 26
Review Action: RELEASED, APPROVED
Review Authority: kellerpr
Review Comment: n/a
Review Content Flags:
Review Date: 20 AUG 2001
Review Event:
Review Exemptions: n/a
Review History: RELEASED <20-Aug-2001 by maustmc>; APPROVED <02-Jan-2002 by kellerpr>
Review Markings:

Declassified/Released
US Department of State
EO Systematic Review
30 JUN 2005

Review Media Identifier:
Review Referrals: n/a
Review Release Date: n/a
Review Release Event: n/a
Review Transfer Date:
Review Withdrawn Fields: n/a
Secure: OPEN
Status: NATIVE
Subject: IMPACT CANADIAN ENERGY SITUATION ON AGRICULTURAL COMMODITY
TAGS: EAGR, ENRG, CA
To: STATE
Type: TE
Markings: Declassified/Released US Department of State EO Systematic Review 30 JUN 2005